



PipeDrive & RingCentral Integration User Manual

This guide explains how to integrate PipeDrive with RingCentral to enable in-app calling and texting, with all activity automatically logged. It covers installation, setup, and usage to help sales teams communicate efficiently and track interactions in one place.

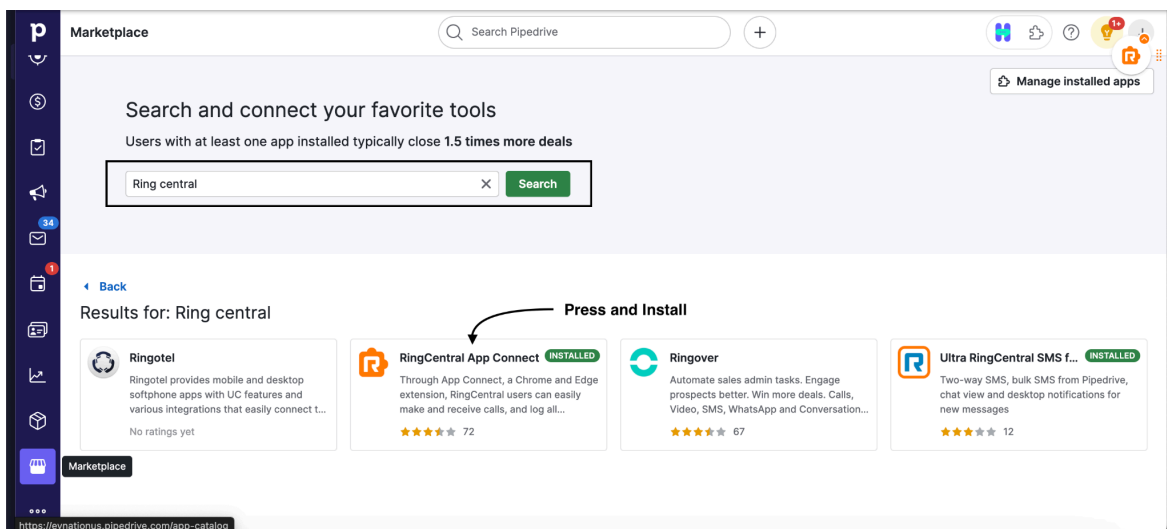
Requirements

- A valid PipeDrive account
 - A RingCentral account with SMS and calling permissions
 - Use Google Chrome to access PipeDrive (Important)
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Installation Steps

1. Install from PipeDrive Marketplace

- Go to the PipeDrive Marketplace
- Search and install “RingCentral App Connect”
- Authorize the app and follow the instructions
- You’ll be redirected to the Chrome Extension page



RingCentral App Connect×

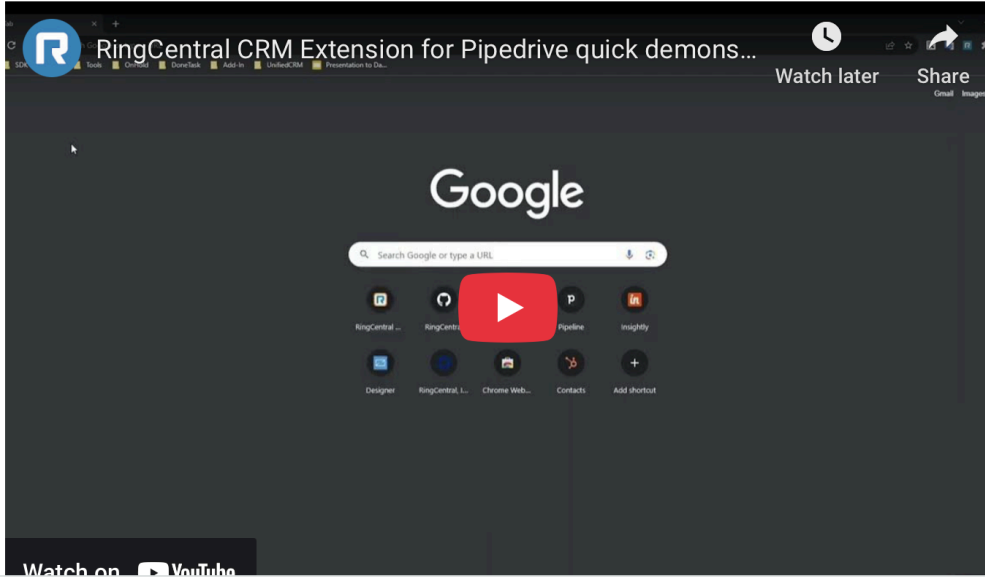


RingCentral App Connect
Automate my pipeline and data
RingCentral Labs

★★★★☆ (26)

100+ installs

[Description](#) [Setup and installation](#) [Resources](#)

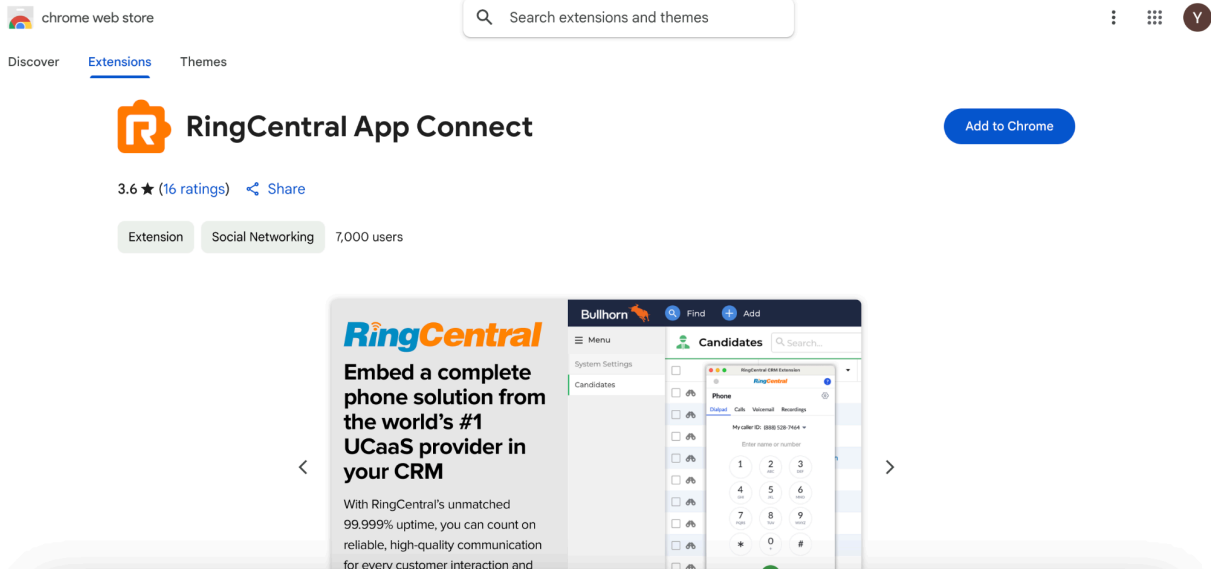


Watch on YouTube

Close Authorize

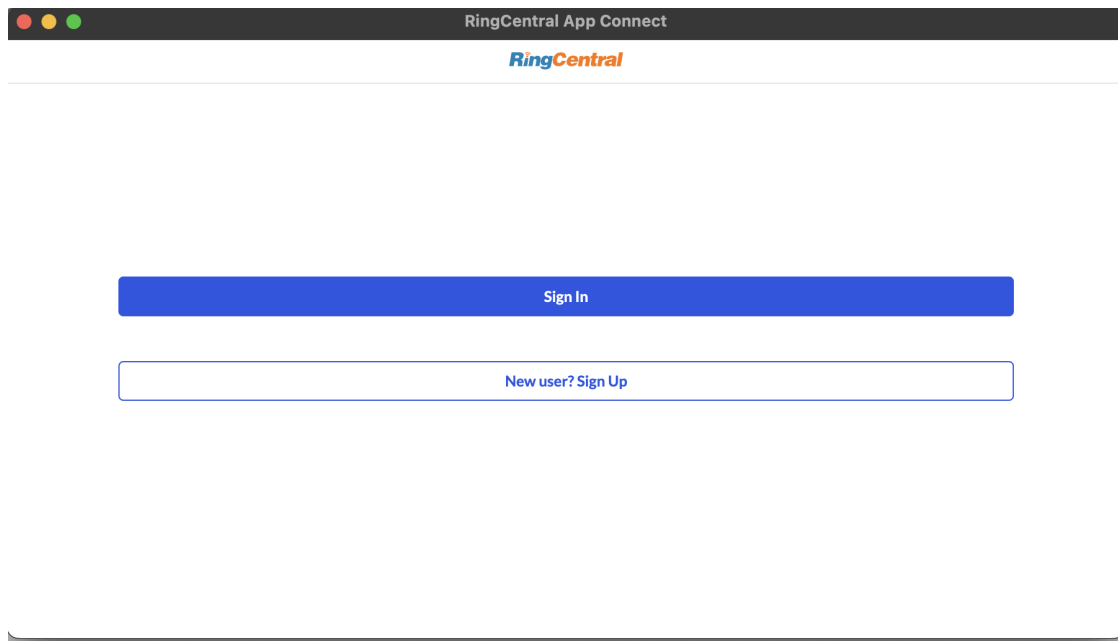
2. Add Chrome Extension

- On the Chrome Extension page, add RingCentral App Connect to your browser
- Return to the previous PipeDrive page and refresh
- A popup will appear on the right → RingCentral App Connect is now active



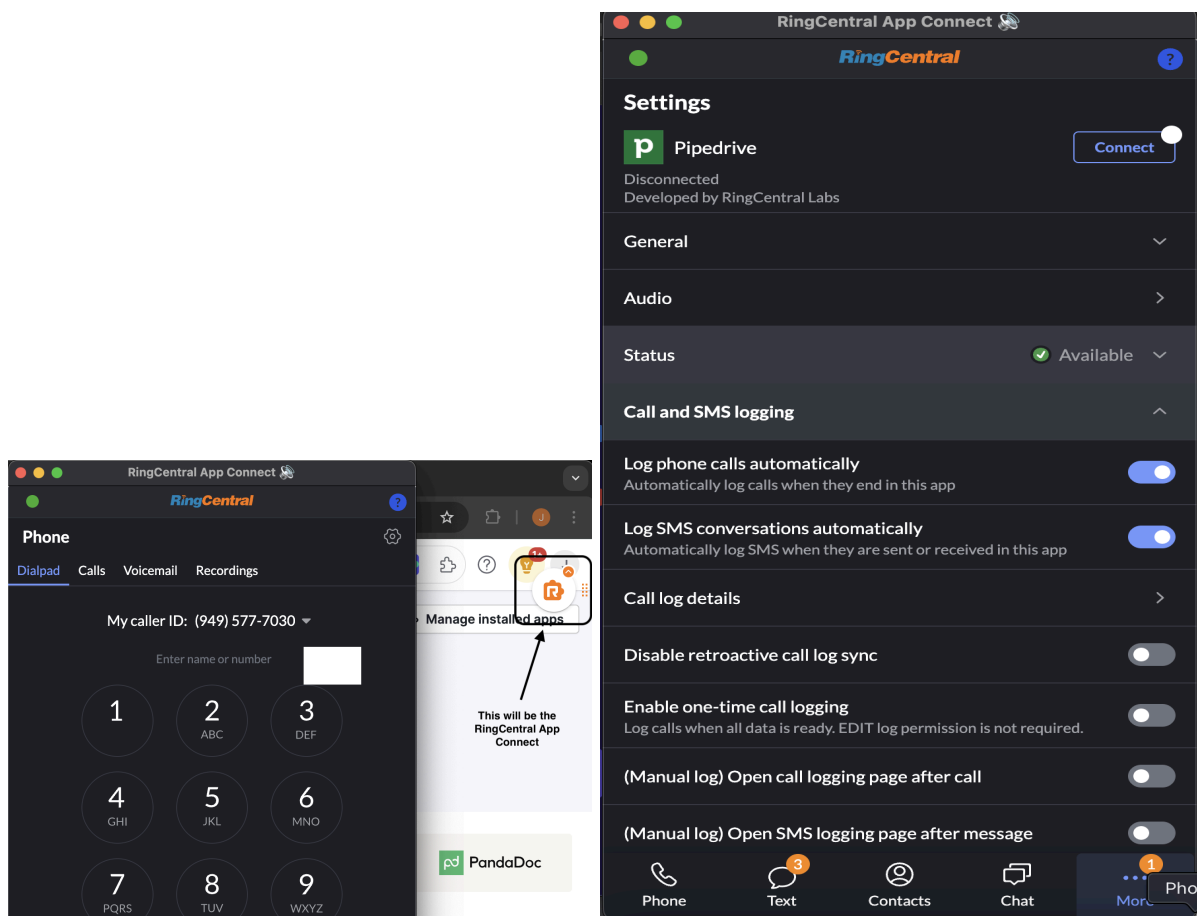
3. Log in to RingCentral

- Open the RingCentral App Connect popup
- Sign in with your RingCentral account



4. Configure Logging Settings

- Go to Settings in the app popup
- Select Call and SMS Logging
 - Enable:
 - Automatically log phone calls
 - Automatically log SMS conversations





How to Use

- In any Person, Lead, or Deal view, hover over the phone number Buttons for Call or Text will appear
- For texting, the message will be automatically logged in PipeDrive after sending
- For calls, press the “Record” button during the call → Once the call ends, it will be automatically logged in PipeDrive history

